

DataBank

LOW-COST CARRIERS

LCCs ON THE RISE

Statistics from aviation information provider OAG show that the global rise in capacity share for low-cost carriers (LCCs) has nearly doubled over the past decade.

13.7%

of global market share for LCCs in 2006.

Source: OAG

27.3%

of global market share for LCCs in 2015.

Stats,
facts and
figures
from
the LCC
market

GLOBAL GAINS

OAG figures show how LCC capacity share has grown across six regions since 2009.



Year	Europe	North America	Latin America	Asia	Middle East	Africa
2009	27.9%	27.9%	21.2%	12.3%	6.3%	6%
2010	30.3%	29.1%	27.3%	14.3%	7.7%	7%
2011	31.3%	30%	30.7%	17.6%	9.9%	7.8%
2012	33.7%	29.6%	32.6%	20%	13.2%	6.5%
2013	35.5%	29.9%	36.3%	22.0%	16.4%	6%
2014	37.1%	30.3%	37.7%	24.2%	16.5%	5.8%
2015	38.2%	31.3%	36%	25.6%	19.5%	7.8%

Source: OAG

BOOKING DIRECT v GDS

Travel data specialist Agentivity analysed 482,908 passenger name records (PNRs) created by its customers in 2015.

42%

58%

● LCCs booked 'passively' in the GDS (global distribution system) – that is, booked directly via the airline or online, and entered into the GDS for ticketing purposes only.

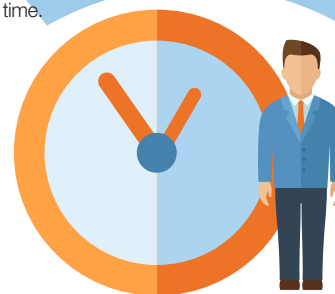
● LCCs booked 'properly' in the GDS.

Source: Agentivity

RIDE ON TIME

OAG compiled flight data for the major LCC operators to the end of September 2015 to calculate their on-time performance (OTP), based on all flights arriving on time or within 15 minutes of their scheduled arrival time.

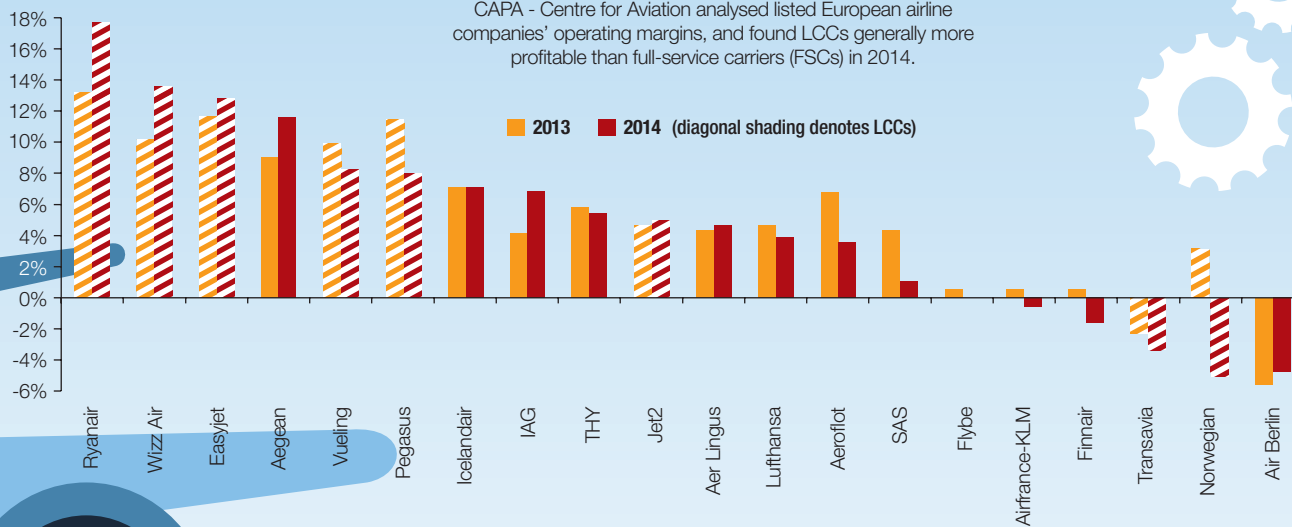
Airline	Number of flights tracked	Number on time or within 15 minutes	OTP
Ryanair	647,103	517,147	80%
Norwegian Air Shuttle	222,793	176,960	79%
Wizz Air	127,696	100,167	78%
Easyjet	694,536	530,728	76%
Jet2	52,763	38,755	73%
Vueling	219,771	154,900	70%



Source: OAG

OPERATING MARGINS

CAPA - Centre for Aviation analysed listed European airline companies' operating margins, and found LCCs generally more profitable than full-service carriers (FSCs) in 2014.



Source: CAPA - Centre for Aviation, analysis of company reports



CLEARED FOR TAKE OFF

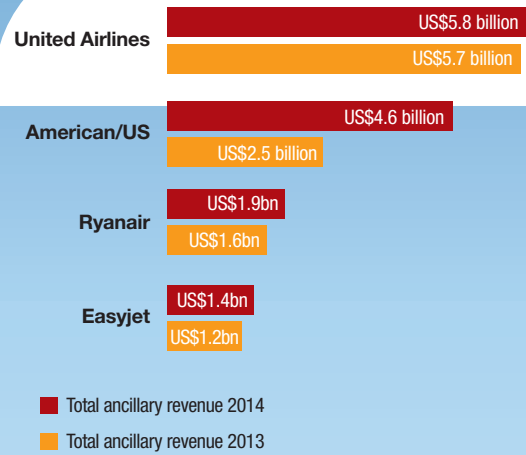
OAG figures show how many flights each of the six largest LCCs will fly from their top three departure airports, and the total number of seats, in 2015.

Airline	Airport	Frequency	Total number of seats
Ryanair	Stansted	56,144	10,611,216
	Dublin	32,751	6,189,939
	Milan Bergamo	25,527	4,824,603
Easyjet	Gatwick	58,443	9,673,948
	Geneva	23,496	3,909,864
	Milan Malpensa	23,332	3,773,904
Jet2	Manchester	4,939	914,524
	Leeds Bradford	4,559	796,333
	Newcastle	2,312	377,045
Norwegian	Oslo Gardermoen	36,534	6,826,289
	Stockholm	18,700	3,545,324
	Copenhagen	15,801	2,952,059
Vueling	Barcelona	51,874	9,284,022
	Rome Fiumicino	12,949	2,330,848
	Paris Orly	8,942	1,593,014
Wizz Air	Luton	12,881	2,324,230
	Budapest	9,098	1,645,190
	Bucharest Henri	6,895	1,241,100

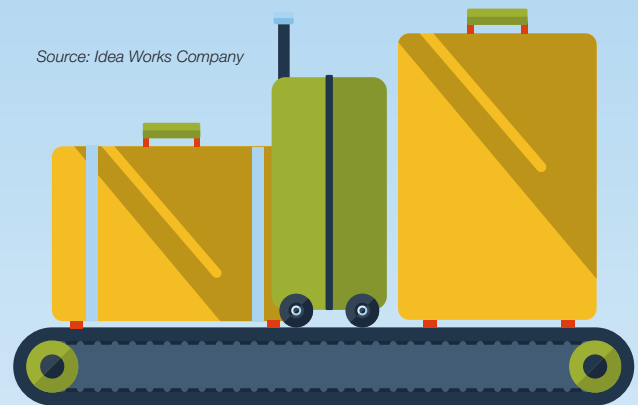
Source: OAG

THAT LITTLE BIT EXTRA...

Aviation consultancy Idea Works Company compared the two highest-earning LCCs and FSCs, based on ancillary revenues, for 2014.



Source: Idea Works Company



FLIGHTS AND FIGURES

The European Low Fares Airline Association monitored LCC figures between July 2014 and June 2015.

Airline	Passengers	Number of daily flights	Destinations	Routes
Easyjet	67.1 million	1,416	138	776
Flybe	7.6 million	474	59	155
Jet2	6 million	200	52	205
Norwegian	24.5 million	430	192	405
Ryanair	94.3 million	1,600	192	1,600
Vueling	22.9 million	566	155	375
Wizz Air	17.3 million	352	118	380

Source: European Low Fares Airline Association

